Website Best Practices Checklist

By following these best practices, financial advisors can ensure their firm has a compliant, beautiful, lead-generating website that grows their business.

1. Ensure Your Homepage Passes the 5-Second Test

Visitors should be able to quickly understand what your page is about, what you do, who would benefit from your services, and what action to take next.

2. Write Your Headline in Problem-Solution Format

The headline should clearly identify the problem that you solve and for whom.

3. Write an Engaging and Personality-Driven “About Us” Page

Visitors should be able to learn about your background, experience, and personality. Avoid just including headshots and bios. Instead, answer questions like "Why did you get into the business? Why do you love the business? Why do you and your team love what you do?". Use first person when telling your story! Include pictures of your team!

4. Plan Your Content and Navigation Around What Visitors Want

Identify your target audience and create content and navigation that is relevant to their needs and interests. Keep nav titles simple and concise. Don't confuse customers on what the page is.

5. Make Your Copy and Site Scannable

Visitors should be able to quickly scan the website and get the information they need without having to read every word. Use clear and concise headlines that communicate sections of copy.

6. Include At Least Two CTAs on the Home Page (Primary & Secondary)

The primary CTA should be the most important action that you want visitors to take (typically the 1st step in your customer journey), and the secondary should offer valuable content or a quiz in exchange for their name and email. Be creative with your buttons and avoid using "Click Here.”

7. Make Your Calls-To-Action Persistent and Always Visible

CTAs should be visible on every page (typically in the navigation) of the website and should be easy for visitors to find. Use access colors for your primary call to action to stand out from your brand colors.

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8. Include a Calendar Link

This makes it easy for visitors to schedule a consultation or meeting with you, which can significantly increase conversions. Contact us links are great for general questions. Calendar links get them right on your calendar.

9. Include a Video On Your Website

A video is a great way to introduce yourself and your services to potential clients. It is also one of the most clicked-on assets on a website.

10. Include Conversation Starters On Your Website

These can be things like a rollover specialist or a picture of your office dog. Having something unique about your firm gives visitors a sense of your personality.

11. Publish New Content On Your Website Regularly

Use your blog and events to keep visitors engaged and coming back for more. Frequency matters.

12. Include Awards, “As Seen In” and Testimonials On Your Site

Social currency and authority matter. Adding these elements provides significant credibility to you and your services.

13. Include an FAQ Page On Your Website

Use questions you get during onboarding to create an FAQ page. In this, you can include your pricing and other frequently asked questions which will also help your SEO.

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